

Instructions for MORRIS User Profile Information form.

This form is used to gather the required information for the establishment of a MORRIS User ID. Questions should be referred to Gary Haddox, GSA Center for Billing Management, at 703-306-6218. Fax the completed form to Gary Haddox (2C20) at 703-306-6290.

1. Enter the last name of the person who is to have access to MORRIS.
2. Enter the first name and middle initial of the person who is to have access to MORRIS.
3. Enter the Internet e-mail address of the person who is to have access to MORRIS. This address will be used to send information regarding updates and changes to the MORRIS system and for the delivery of special reports which may be requested that are not available on-line.
4. Enter the phone number, including the area code, for the person who is to have access to MORRIS. This number will be used to notify the new user of the initial password assigned or in case of questions or problems.
5. If the new user would like a specific user id, enter that id here. The user id must be between 5 and 20 characters. It must start with a letter and contain only letters, numbers, the pound sign, underscore, or dollar sign (#, _, \$ respectively). Users will have a choice of passwords that will not be case sensitive. It is recommended that the password contain at least one number or special character.
6. Enter the name of the agency to which the user belongs.
7. Enter the name of the organization within the agency to which the user belongs.
8. This item is used to identify the FTS2001 Hierarchy Codes or hierarchy trees for which the user will be able to see billing information and reports. A hierarchy tree is a collection of all hierarchy codes subordinate to a given hierarchy code. Most users are allowed to see information for their hierarchy code or tree only. Enter the Hierarchy Code on line 8a and place an 'X' on the line adjacent to either 8y or 8z whichever is appropriate. Lines 8b and 8c are not needed unless other individual codes or other hierarchy code trees need to be specified. See examples on the next page.
9. This item is used to specify the Hierarchy Code that will be used as default whenever the user logs into MORRIS. This eliminates the need for the user to enter a desired hierarchy code unless a report for another code is desired. This would normally be the same code as entered on line 8a unless additional lines are used under item 8.
10. This column is used to authorize the person named in items 1 and 2 to name alternates or delegates who should be given access to MORRIS for one or more hierarchy codes at or below the level of the code shown. Enter your initials to the right of the hierarchy code(s) in item 8 for which you grant this authority. Use the lines in the column labeled "For #10, New Users."
11. Enter an "X" on the appropriate lines under each contract name to indicate which reports or bill data the user should have access to via MORRIS.
12. The Agency Official approving this request for MORRIS access should enter his/her name and other information in the appropriate fields then sign and date the form. The most recent form for an individual will supercede all previous forms.

GSA Billing Management Center will notify the user via telephone when his or her user id has been established and activated.

Examples of entries for items 8:

Example 1:

Hierarchy code for the organization or bill level for which the user is responsible:
3600 8200 0002 0500 3000 0000 0000.

Sample subordinate codes: 3600 8200 0002 0500 3000 0000 1990
 3600 8200 0002 0500 3000 0001 0000
 3600 8200 0002 0500 3000 0001 1990

Other non-subordinate codes: 3600 8200 0002 0528 3011 0000 1990
 3600 8200 0002 0528 3011 0001 1990
 3600 8200 0002 0528 3012 0000 0000
 3600 8200 0002 0670 0000 0000 0000

User has access to all information for his and subordinate hierarchy codes. User can name others to have access to the same information the user has or any portion of it, but can not change billing information or create new bills.

		For #10	
a.	3600 8200 0002 0500 3000 0000 0000	<u>WDS</u>	← handwritten initials
b.	_____	_____	
c.	_____	_____	
y.	For these hierarchy codes only:	_____	
z.	For these and all subordinate codes:	<u>X</u>	

Example 2:

Hierarchy code for the organization or bill level for which the user is normally responsible:
3600 8200 0002 0670 0000 0000 0000.

User has access to two different hierarchy code trees as indicated by the asterisks, plus one individual hierarchy code in a third tree. The user can name others to have access in the first two hierarchy code trees.

		For #10	
8 a.	3600 8200 0002 0500 3000 * _____	<u>WDS</u>	← handwritten initials
b.	3600 8200 0002 0670 * _____	<u>WDS</u>	
c.	3600 8200 0002 0528 3012 0000 1990	_____	
y.	For these hierarchy codes only:	<u>X</u>	
z.	For these and all subordinate codes:	_____	